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AUTHOR Montgomery, Joel R.
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ABSTRACT

Andersen Consulting is a global training firm with more than 20,000 consultants serving clients from 151 officers in 46 countries. In 1995, Andersen Consulting introduced a career development model (CDM) as a new organizing structure for its consultants in North and South America. The CDM, which translates the findings of research on integrative learning into practice, identifies skill tracks, more specialized skill domains, and six levels of competence within each domain. The CDM was introduced to Andersen's consultants through an applied CDM workshop that was developed using the Integrative Learning System, which is based on the following support components: applying integrative learning to build knowledge and skill, providing a learning-safe work environment, coaching to think, teaming to innovate, and trusting to synergize. The applied CDM workshop was tested with one training development team in Washington, D.C., and three teams in Atlanta, Georgia. During the workshops, teams engaged in a reflective learning process involving the following steps: do, look, think, continually evaluate relevance, and plan. The tests demonstrated that integrative learning can be developed quickly and effectively with limited resources by ensuring that all support components for integrative learning are in place. (Contains 11 references.) (MN)

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ED 399 417

Integrative Learning at Work: Theory into Practice at Andersen Consulting

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Joel R. Montgomery
Andersen Consulting LLP

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In working with Integrative Learning, its four support components, and the Integrative Learning System to develop and facilitate a professional development workshop for its Human Resources personnel, Andersen Consulting's experience of translating theory into practice demonstrates that Integrative Learning can be developed quickly and effectively with limited resources, providing a theory-based strategy for designing and facilitating professional development experiences for adults in the workplace. Keywords: Integrative Learning, Reflective Learning, Learning Theory, Workplace Learning, Systems Thinking

Integrative learning (integrating learning with life experience) offers a challenging approach to understanding and facilitating learning and professional development (Montgomery & Lau, 1996). This paper focuses on translation of theory into practice at Andersen Consulting using the development and facilitation of one workshop as an example.

Andersen Consulting Context

Andersen Consulting (AC) is a global firm with more than 20,000 consultants serving clients from 151 offices in 46 countries (Nowakowski, 1994).. Andersen Consulting's mission is: To help our clients change to be more successful. The vision of how Andersen Consulting accomplishes this vision is that it is: *One global firm*, committed to *quality*, working with the *best people* and *knowledge capital*, *partnering* with the *best clients* to *deliver value*. Andersen Consulting is committed to working with innovative ideas in learning, technology, and performance enhancement and in moving theory into practice. Education and professional development are considered key to Andersen Consulting's success in the global marketplace. In 1996, AC used *Business Integration* as its market focus, assisting clients by developing integrated (holistic) business solutions working with consultants who have specialized skills in the areas of *strategy, technology, change management, and business processes.*.[1]

AC's Career Development Model

In September, 1995, Andersen Consulting introduced a "Career Development Model" (CDM) as a new organizing structure for consultants in North and South America. Once implemented in the *Americas practice*, the CDM can serve as a guide for our global firm. In brief, the CDM identifies skill tracks, more specialized skill domains, and six levels of competence within each skill domain. Consultants in AC are identified with a primary skill track in each of the business integration focus areas and build competencies within this skill track throughout their career. Proficiency Development Profiles (PDP's) assist each consultant to identify specific areas and plans for growth which include staffing on engagements, self-study, and formal learning experiences offered both inside and outside the firm. Human Resource (HR) professionals in our Practice Management organization are on the front line to implement the CDM in local offices. In addition, these HR professionals work with the CDM in interacting with their internal clients (AC engagement partners and managers) to handle staffing, recruiting, and professional development of consultants. In essence, these HR professionals function as internal change agents, delegated by AC to work with the CDM on a daily basis and to assist engagement partners and managers and all AC consultants to internalize the CDM as a part of their daily and long-term staffing and career planning decisions.

Applied CDM Learning Day

While AC HR personnel had been introduced to the CDM and to an on-line tool that assisted them to work with the CDM for career planning, due to the volume of changes currently experienced in Andersen

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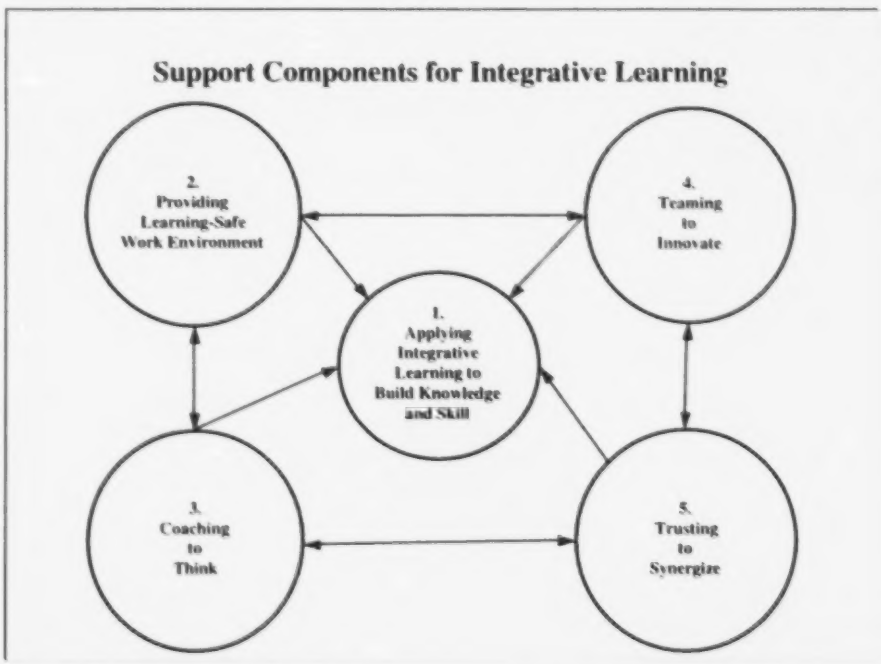
Consulting, many HR professionals had only a surface understanding of the CDM and had not integrated the CDM as part of daily decision making processes. Developing a professional development workshop to assist people to become more familiar with the CDM became a priority. Certain restrictions applied: This workshop needed to be developed quickly, for maximum effect, with limited resources, and for use in local offices. After some initial teleconferences with a "virtual" development team located in New York, NY, Washington, DC, Chicago, IL, St. Charles, IL, Dallas, TX, and Denver, CO, three people met in New York in late December, 1995, for a day and a half. At the conclusion of that meeting, the team decided that the workshop would take eight hours, use the Integrative Learning approach, and would involve teams of six HR professionals with multiples of three or four teams in each workshop. The workshop, now called a "learning day," would take place in local or regional offices throughout the Americas and could be expanded to AC's global practice when the CDM becomes integrated worldwide. The team later decided on two learning coaches per workshop plus a senior HR professional in the role of *coach-participant*. The target audience of learners was 200 HR professionals in staffing, recuiting, and training positions throughout the United States of America. The time available to develop the workshop was approximately three months with part-time effort.

The workshop was developed using the Integrative Learning System (discussed in more detail later in this paper). The workshop was tested with one team in Washington, DC, in early February and, with minor revisions, was tested with three teams in Atlanta, GA, on February 16th. While the workshop is still under development, sufficient data has already been collected to indicate that this workshop is a successful example of Integrative Learning and of the use of the Integrative Learning System.

Support Components for Integrative Learning

Figure 1


Support Components for Integrative Learning
2. Providing Learning-Safe Work Environment
4. Teaming to Innovate
1. Applying Integrative Learning to Build Knowledge and Skill
3. Coaching to Think
5. Trusting to Synergize

Providing a Learning-Safe Work Environment

Teams had freedom to choose their own strategies for meeting the challenges of the day. Learning was emphasized over performance.

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Coaching to Think

Teams had three levels of coaching support: coach-participants (senior HR professionals from their local office who participated as a team member during the workshop), learning coaches (who provided support to each team in allowing the teams freedom to explore and discover while reminding the team of the task and process outcomes they were expected to complete by the end of the day), and a coaches-coach who set the initial tone for learning, then interacted with teams and coaches as needed, especially following up with the learning coaches to support the learning. All coaches supported reflective learning (Jarvis, 1992; Montgomery, 1990) and innovative thinking.

Teaming to Innovate

Intact, cross-functional work teams were encouraged to deepen appreciation for each other's roles.

Trusting to Synergize

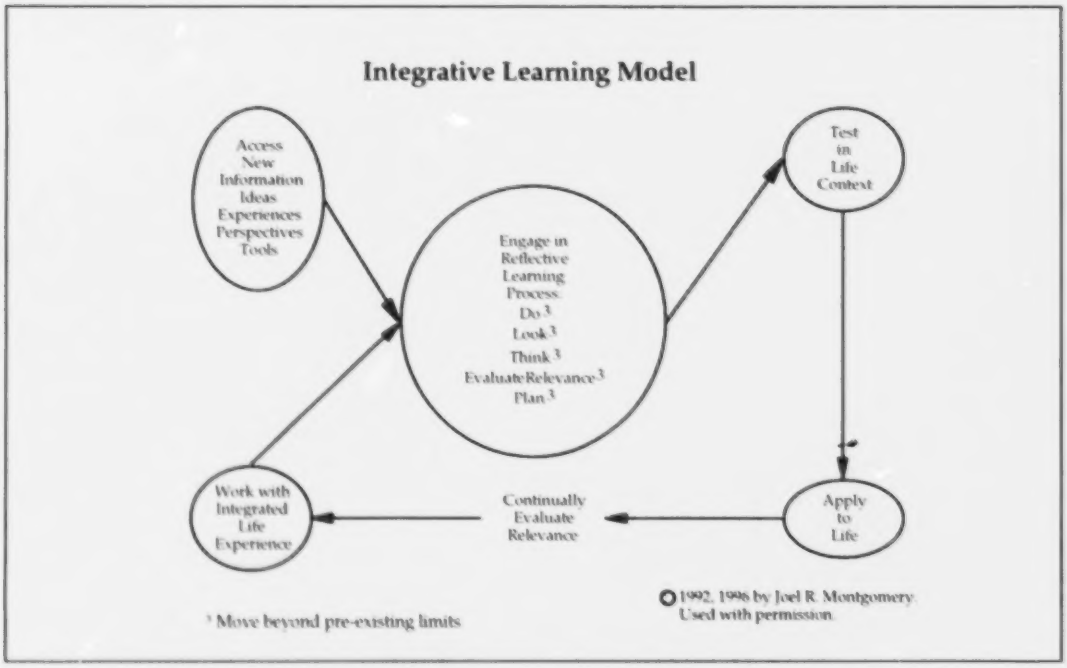
Teams were encouraged to build new levels of trust (Gibb, 1991) and engaged in trust-building activities.

Applying Integrative Learning to Build Knowledge and Skill

Teams worked through the Integrative Learning process throughout the workshop. Learning coaches are developing their skill in facilitating the Integrative Learning process. Details of how this model was applied in the workshop are in the next section.

Integrative Learning In Practice

Figure 2



New Information, Ideas, Experiences, Perspectives, and Tools

In this workshop, learners worked in cross-functional teams sharing day-to-day activities usually performed alone. They also applied the CDM and on-line tool to day-to-day activities usually done without that support. Teams documented their thinking and behavior patterns, learning, and action items throughout the day.

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Work with Integrated Life Experience

By working in cross-functional, intact work teams, some learners were intimately familiar with their normal routines (e.g., handling a staffing request) while other team members knew their role and process and had only a shallow understanding for what their colleagues do in their daily activities. The context of handling Andersen Consulting HR requests was familiar to all. This workshop took place in their local office or in the local office training facility. The on-line tools were on their lap-top computers and learners were encouraged to use any job aids they may have in their office. In addition to bringing in their work experience, the work on building trust and increasing the effectiveness of their teams was also based on their experiences with each other to date.

Engage in the Reflective Learning Process: Do[3], Look[3], Think[3], Evaluate Relevance[3], Plan[3] ([3] Move beyond pre-existing limits)

Learning coaches reinforced this reflective learning process (Montgomery, 1992). Teams tracked their thinking and behavior patterns (strategies, decisions, assumptions and process) throughout the day, stopping at frequent intervals to these on flip-charts and to share their learning and action items they wanted to follow-up on back on-the-job. During the pilot test of this workshop this was the most challenging activity of the day for both learning coaches and learners. At the end of the day each team charts to reflect on their experience of the day and, at the conclusion of the workshop, all three teams met to share their learning and action items and to explore ideas for improving performance on-the-job.

Test in Life Context

Each team worked with the new information, ideas, experience, perspectives, and tools to carry out routine HR requests involving staffing, career placement, recruiting, and training. Teams also held conversations as to how they could apply these new ideas to improve the processing of daily routines.

Apply to Life

This aspect of Integrative Learning takes place after the learning experience. Reports from the senior HR professionals involved indicate that the teams began implementing their action items on the job the next business day and are continuing to do so. Office HR leaders are requesting support in developing similar experiences for continuous learning. Learning coaches are requesting more opportunities to build their skills and to use them on a daily basis. Office HR leaders are ask join the learning coach pool for future workshops.

Continually Evaluate Relevance

Teams are conducting on-going conversations about their experience during the workshop and the action items they generated. In addition, a follow-up electronic survey using Lotus Notes was sent to teams seven days after the workshop and will be sent to them two more times at three-month intervals. In these surveys learners respond on a five-point scale or with comments to 41 questions dealing with the value they experienced from the workshop activities, outcomes, and support with regard to on-going performance and professional development.

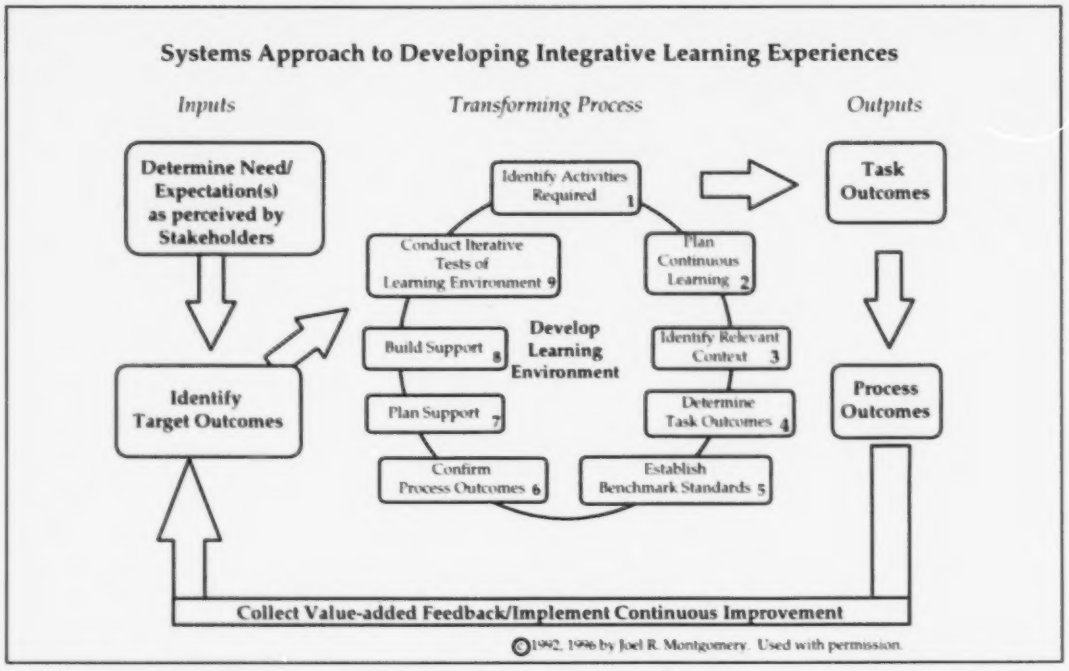
Work with Integrated Life Experience

There is a built-in time delay while each learner applies the new knowledge to life and evaluates its relevance. Early indications from the two workshops conducted so far indicate that key elements from the workshop with regard to supporting cross-functional teams and enhanced use of the CDM and on-line support tools are already being integrated in job performance.

Systems Approach to Developing Integrative Learning Experiences

The Applied CDM Workshop was the product of an Integrative Learning System. The model (see figure 3) allowed developers to plan for integrative learning and to measure the effectiveness of the results of the plan to implement continuous improvement processes. The model itself allowed the development team to experience the same integrative learning the learners will experience in the workshop, just focused on a different content area.

Figure 3


Systems Approach to Developing Integrative Learning Experiences
Inputs
Transforming Process
Outputs
Determine Need/ Expectation(s) as perceived by Stakeholders
Identify Target Outcomes
Identify Activities Required 1
Plan Continuous Learning 2
Identify Relevant Context 3
Determine Task Outcomes 4
Establish Benchmark Standards 5
Confirm Process Outcomes 6
Plan Support 7
Build Support 8
Conduct Iterative Tests of Learning Environment 9
Develop Learning Environment
Task Outcomes
Process Outcomes
Collect Value-added Feedback/Implement Continuous Improvement
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Expanding on the ideas of this model may aid in understanding the model prior to addressing how this model was used in the development of the Applied CDM Workshop.

Inputs

Determine the Need/Expectation(s) as Perceived by Stakeholders

Solicitation of needs and/or expectations of the people who have a vested interest in changed performance is a critical input. There are many forms of needs analysis available. AC often uses a form of qualitative and quantitative data collection and analysis referred to as "concept mapping and pattern matching." Once the needs and expectations are identified, they need to be confirmed with stakeholders who are sponsors for the learning experience being developed.

Identify Target Outcomes

In general, the needs and/or expectations of the stakeholders need to be translated into *target outcomes*. *Target outcomes* answer the question, "what will the learners gain or how will they perform differently after their participation in this learning experience?" Integrative Learning is an example of *learning-focused* education (Montgomery, 1994). For deeper competency building (application of both knowledge and skill), target outcomes need to be limited to a handful so that learners have a chance to practice and develop the skills involved. Some target outcomes focus more on the nature of the learning experience itself than on the post-learning experience benefits. For example, in many learning experiences in AC learners have opportunities to network and to explore on-line knowledge and communication resources during the workshop. When listed as a target outcome, the inference is that, if the learner found value in networking and exploring these resources within the learning experience, she may have a greater likelihood to working with these resources (people and knowledge capital) on the job.

Transforming Process

Develop the Learning Environment

Step 1. Identify Activities Required--In this step, the target outcomes are analyzed and an attempt is made by the development team to identify what the learners need to do in order to achieve the target outcomes.

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Each activity may not be directly linked to a target outcome. At the same time, the ideas is that, once a learner has completed all of the activities in the learning experience, all of the target outcomes will have been accomplished.

Step 2: Plan Continuous Learning--Integrative learning relies on moving through the reflective learning process. Continuous learning in this environment involves assisting the learners to move from a place of *unconscious incompetence* or *unconscious competence* to a place of *conscious competence* where habits and routines are open to change, to a movement beyond pre-existing limits. If learners are focused exclusively on task outcomes or if they do not see the value in slowing down and becoming conscious of their patterns of thought and behavior and how to change the consequences of these patterns, this aspect of the learning experience can be challenged by the learners. Skilled facilitators (learning coaches) are often needed to support this aspect of the design--at least until the learners recognize the value and become more conscious about how to monitor the patterns (Daudelin, 1996). Because tracking these patterns at a conscious level is frequently outside of the comfort zone of the learners, making this a team responsibility with a defined task output related to tracking patterns, process and process outcomes on flip-charts throughout the experience, then reviewing these flip-charts at intervals throughout the experience seems to offer "training-wheels" to learners as they begin to enter into processes of structured reflection on experience (Argyris, 1993; Daudelin, 1996; Montgomery, 1990; Montgomery, 1992; Schon, 1983; Senge, 1990).

Step 3: Identify Relevant Context--Context is important, especially in creating learning experiences where learners are expected to transfer their learning to their work experience. There are two levels of context to be considered: Task context and process context. At Andersen Consulting the task context for professional development experiences often mirrors the environment found on client engagements. Process context refers to the habits and patterns used in the learning environment to engage in learning. While every effort is made at AC to create learning-safe environments, the basic habits and routines come from AC's consulting culture. When designing for a client, we work to use the client's prevailing culture (adapted to be learning-safe) as the process context. In developing Integrate Learning designs, learning needs to drive and to be supported by the context rather than having the context drive the learning.

Step 4: Determine Task Outcomes--Task outcomes need to be the logical consequences of engaging in the needed activities within the relevant context. It is important to create task outcomes (phrased as goals) that are directly connected with the learning activities that allow the target outcomes to be achieved. Unnecessary task outcomes take away from the learning potential of the experience. While continuous learning leads to process outcomes, to instill new habits and to bring patterns of thought and action to a conscious level, tracking the learning frequently needs to be planned for as a task outcome.

Step 5: Establish Benchmark Standards--For adult learners it is important to establish benchmark standards for the task outcomes. These are usually process driven rather than content driven and allow the learners to recognize when their task outcomes or exceed expectations. These also offer a uniform standard for review and feedback by peers and coaches. One example for a benchmark standard for a task outcomes comes from another AC program, the Business and Analysis Design School (BAnDS). One task outcome for each team in the first part of the school is to generate a Business Integration solution for the client's business problem. Benchmark standards for this task outcome are: a. The solution addresses all the business problems identified; b. The solution represents a truly integrated solution. c. The solution meets or exceeds client expectations. If all three criteria are met, the solution meets acceptable standards. Each team may come up with different solutions and some will be better than others. Using benchmark standards, the evaluation process will be at higher standards of quality and the distinctions between solutions will be based on innovation rather than on baseline quality.

Step 6: Confirm Process Outcomes--Once the learning environment has been planned to this stage, the developers can assess the logical process outcomes anticipated. Process outcomes refer to the learning achieved by engaging in the process of producing the task outcomes and in the process of reflecting on that process and on the task outcomes produced. Discovering what worked and what needs to be changed for future production allows the learners to use the experience to enhance their on-the-job performance. By linking both task and process outcomes together, developers can match these projected outcomes to the

target outcomes. If the learners can be expected to achieve the target outcomes by producing both task and process outcomes, this step is complete.

Step 7: Plan Support--Support for this learning environment can be in multiple forms. Indeed, this is one of the key areas of innovation. Support can take the form of learning coaches, peers, content experts, on-line support systems, conference calls, Internet or other knowledge exchange and communication resources. In this step, the development team determines what support the learners will need to engage in the activities in this context and to produce the task outcomes(at the benchmark standards) and the learning outcomes expected. In working with similar environments for almost three years, AC has discovered that different learners look to different sources of support. Development teams need to plan for redundant, well-indexed support, even more so if there is less dependence on live coaches. This support can be a key factor in the investment expense of building this type of learning environment. Support can range from less costly (paper, one or more coaches) to more costly (on-line computer systems, Internet access, etc.).

Step 8: Build Support--Once integrated performance support is planned for (using whatever resources have been selected), the team begins building the support. Adequate support materials are important for each iteration of the next step.

Step 9: Conduct Iterative Tests of the Learning Environment--It is important to test early and often. *Testing* in this context is similar to that in a computer systems environment. Testing refers to conducting a *user's test* of all or part of the designed learning experience to see if the learners ' experience meets or exceeds developer's expectations for the design. Rather than wait for the entire experience to be developed, smaller tests of pieces of the design can lead to early changes which greatly improve the effectiveness of the entire learning experience. There is no pre-set number to how many tests are needed. In early development of environments similar to these, AC took designs through seven iterations before they decided that the design was ready for continuous improvement rather than major revision. In a test a full run-through of the learning environment, as is, is done with learners and the task and process outcomes are assessed for effectiveness with regard to target outcomes. Formative feedback (usually qualitative) is collected from these learners and developers implement the continuous improvement cycle on what has been done so far as they continue to build to the complete learning experience.

Application of Systems Model to the Applied CDM Workshop

Rather than elaborate on the process involved in each stage of creating the outcomes of the model, this paper addresses the outcomes of each stage to provide a more concrete example of the model.

Stakeholder Expectations

1. Assist HR professionals to become more effective change agents for the institutionalization and internalization of the Career Development Model in Andersen Consulting.

2. Assist HR professionals to work effectively in cross-functional teams.

Target Outcomes

1. Practice working with the CDM in staffing, recruiting, and training activities.

2. Practice working in cross-functional HR teams.

3. Make HR decisions in the context of the CDM.

4. Reflect on the impact of the CDM on HR decisions and activities.

5. Transfer knowledge to peers and share learning experience.

6. Network with other HR professionals.

7. Identify action items for self, intact work team, and organization.

8. Make a personal commitment to action items.

Transforming Process (shown as the activity agenda for the workshop)

1. View a video-tape setting up the day.

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2. Participate in a welcome and orientation session facilitated by a learning coach.

3. Move into intact work teams and engage in a team and trust development activity focused on personal background, experience, and concerns regarding use of the CDM in AC.

4. In teams view a video setting-up task outcomes of the day.

5. Engage in a strategy session developing initial plans to deal with all task and process outcomes on the goals checklist. For each activity plan to document "going in" strategy, then to review strategy, benchmarks, outcomes, lessons learned, and implications for future activities both in and out of the workshop.

6. Continue the strategy with the other teams over lunch. After lunch, return to the individual team rooms.

7. Participate in a conference call with an engagement manager (role-play for "Cool Breeze" engagement).

8. Continue strategy session answering the questions, "What do we know? What do we need?" (Using all available resources, tools, and reflection aids.)

9. Interview an experienced hire consultant (role-play) with the purpose of preparing a skill map and recommending a proficiency development plan to assist the consultant to build needed career skills. Track patterns, learning, and action items.

10. Counsel a new hire analyst (telephone role-play) regarding skill tracks and career options. Track patterns, learning, and action items.

11. Engage in a team conversation regarding recruiting strategies to recruit experienced hire consultants needed for "Cool Breeze" engagement. Track patterns, learning, and action items.

12. Conduct a follow-up conference call with the "Cool Breeze" engagement manager (role-play), responding to his/her initial request. Track patterns, learning, and action items. Receive feedback from the manager at the end of the conversation.

13. Review team task and process outcomes produced during the day and hold a team conversation regarding learning and action items for the team. Plan what the team wants to share with the other teams.

14. Rejoin the other teams and participate in a facilitated conversation (led by learning coaches) regarding learning and action items from the day and strategies for implementing new ideas.

Task Outcomes

1. Work with the CDM and on-line tools to respond to staffing requests supporting a business integration engagement ("Cool Breeze").

2. Work with the CDM and on-line tools to create a skills map and a proficiency development profile for an experience hire consultant.

3. Work with the CDM and team resources to produce a strategy for recruiting an experienced hire for the "Cool Breeze" engagement.

4. Work with the CDM in counseling a new hire analyst regarding skill tracks and career opportunities.

5. Document strategies, process, assumptions, decisions, consequences, learning, and action items developed throughout the day.

Process Outcomes

1. Become more proficient in using the CDM and on-line tools in making HR decisions regarding staffing, recruiting, and training.

2. Increase ability to work effectively in supporting other HR functional specialties.

3. Build awareness of patterns of thought and behavior in making and communicating HR decisions with co-workers and clients.

4. Identify areas for continuing development and growth as a community of HR professionals.

Value-Added Feedback for Continuous Improvement

A qualitative survey was used to ask learners for formative feedback one week following the development test of the workshop in Washington.

One week after the pilot test in Atlanta a 34-question survey asked learners to respond on a five-point scale to the value added to overall job performance and on-going professional development by each of the target, task, and process outcomes and by their experience of the workshop and the learning environment. The same scale was used for non-comment questions on the survey: 1=no value added; 2=little value added; 3=some value added; 4=valuable 5=very valuable.

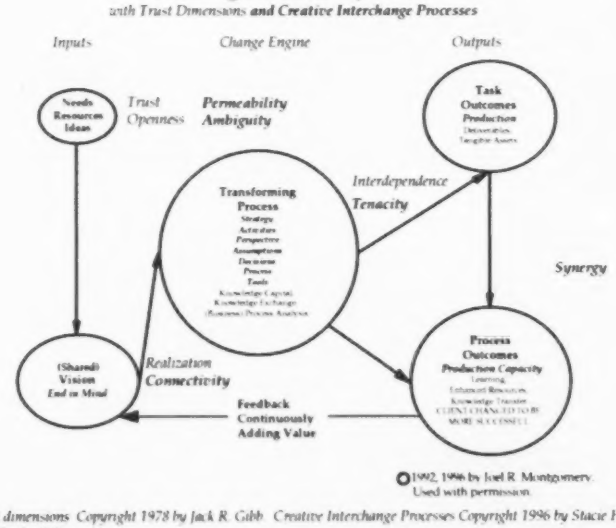
This survey will be repeated two more times at three month intervals and the results of the survey will be compared using the pattern matching statistical analysis process mentioned earlier in this paper.

Conclusions and Next Steps

The example of Andersen Consulting's Applied Career Development Model (CDM)workshop demonstrated that Integrative Learning can be developed quickly and effectively with limited resources by using the Integrative Learning System and by ensuring that the four support components for Integrative Learning are in place. Feedback on the recently tested workshop is overwhelmingly positive.

More research is needed on the development and use of Integrative Learning at work. In addition, a program to assist learning coaches to work consciously and actively with the four support components in an Integrative Learning environment is clearly a high priority for action and research. Participants and learning coaches in the Applied CDM workshop identified this type of support as a requested action item for continuous improvement. Research on various aspects of this support have been on-going since the 1960's (Gibb, 1991, Montgomery, 1991; Montgomery, 1992). A current focus for learning coach preparation is work with *creative interchange*[ii] to prepare learning coaches to assist teams to be more effective in their interaction and in their development of trust. Another on-going focus is work with a *Team Productivity Model*[iii] which allows learning coaches to develop greater sensitivity to the potential focus and timing of interventions while a team is engaged in Integrative Learning. A third focus is greater understanding of how to assist learners to engage in reflective learning in the context of their work experience (Argyris, 1993; Daudelin, 1996)

Figure 4



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[i] Extracted from the Andersen Consulting Education Overview (Microsoft PowerPoint) presentation prepared in January, 1996. (Notes held by the author.)

[ii] *Creative Interchange* is a model fusing attitude and behavior which was developed from the work of Henry Nelson Weiman by Stacie Hagen and Charlie Palmgren of *SynerChange* International, Inc., 3678 Doroco Drive, Atlanta, GA 30340 (Tel. 770-414-5182). (Notes held by the author.)

[iii] The *Team Productivity Model* is a systems model which looks at the process and stages of trust development involved for teams to move through a project that leads to both task and process outcomes. The model itself is another perspective on the Integrative Learning model. (The *Value-Added Coaching Model* represents an earlier version of this new model.) (Notes held by the author.)

[iv] Contact the author at P.O. Box 551, St. Charles, IL 60174-0551; tel. (708) 208-0336; Fax: (708) 208-0337; AT&T tel. (500) 443-0443; e-mail:joelmonty@aol.com. (Note: the Area Code changes to 630 after August 1, 1996.)